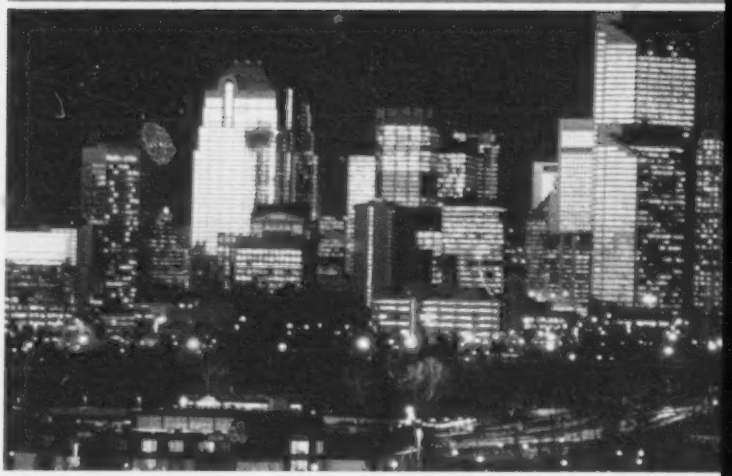

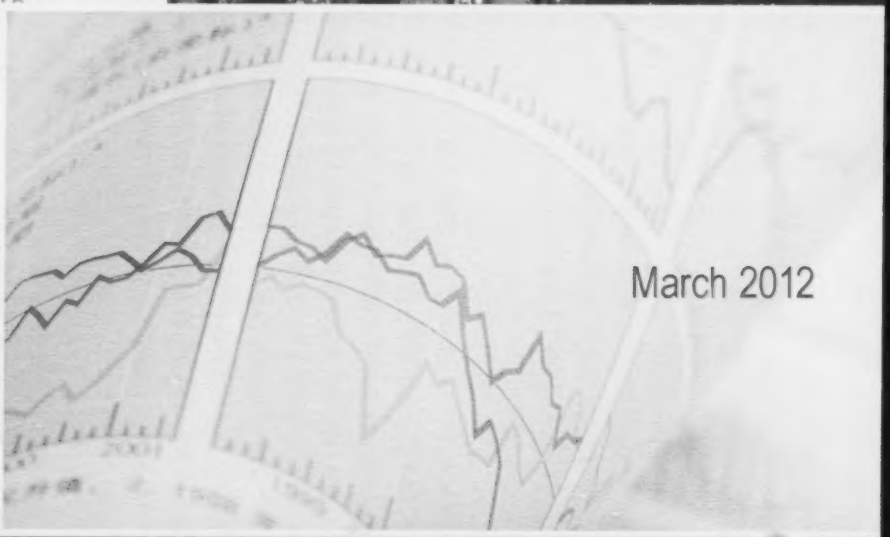

March 2012

Regional Economic Indicators

South Central Region

Government of Alberta

SOUTH CENTRAL REGION

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The Region at a Glance

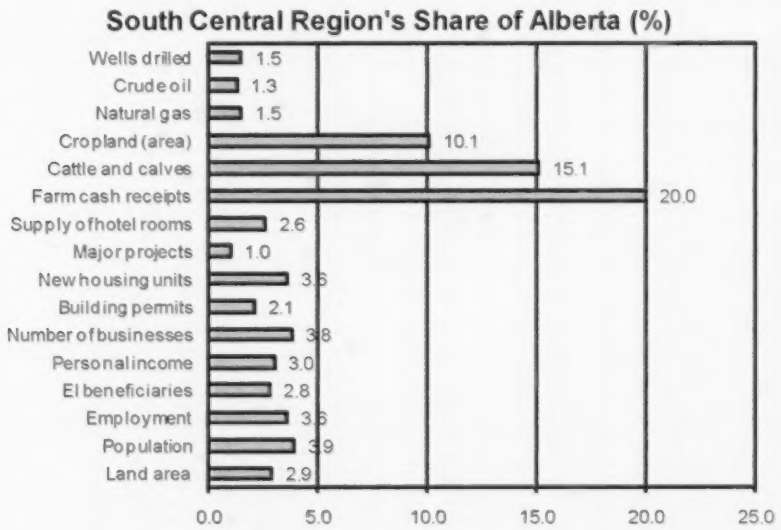
The South Central region covers an area of 18,605 square kilometers, larger in size than the state of Hawaii. The region accounts for 2.9% of Alberta's land mass and for 3.9% of Alberta's population.

According to Statistics Canada's latest estimates, the region's population totaled 145,000 in 2010, an increase of 7.0% from 2006. According to the 2006 federal Census, the number of employees was 67,755 and the region's unemployment rate was 4.2%.

The region's largest industry on an employment basis is health care and social services, accounting for about 12% of total employment in Census year 2006, followed by agriculture and retail trade at 11% each. The region also has a sizeable manufacturing industry, concentrated in the food and beverage and transportation equipment sectors. The fastest growing industries between Census years 2001 and 2006 were the utilities (including wind energy) and oil and gas sectors, each of which grew its employment level by about 45%, followed by administrative support, waste management and remediation services which increased its employment by one-third. Employment in the transportation and warehousing sector fell by 3% in the South Central region between the two Census years.

According to personal income taxfiler data the average individual income in the region was $27,400 per taxfiler in 2007, a 28% increase from 2003. Average income for couples was $87,000 in 2007, a 33% rise from 2003.

The South Central region is one of Alberta's top two agricultural regions. It accounts for 20% of the province's farm receipts and for 15% of the total number of cattle and calves. It is the province's largest producer of durum wheat, potatoes, corn and pulse crops, such as peas and beans, and is also a major producer of barley, wheat, hogs and poultry. The region is a large producer of wind energy and conventional crude oil.

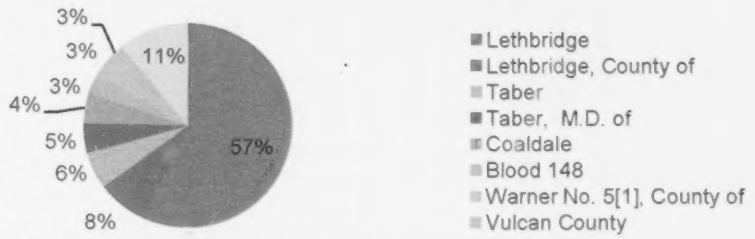


Although very few current indicators are available on a regional basis, it is clear that the impacts of the global economic crisis have also subsided in this region: although the number of Employment Insurance beneficiaries receiving regular benefits in the South Central region fell by a mere 1% between 2009 and 2010, it declined by 26% between June 2010 and June 2011.

Major Municipalities

The largest municipality in the South Central Region, according to the 2006 Statistics Canada Census, was the City of Lethbridge with a population of 74,637[1]. The municipality in the South Central Region with the highest population growth between 2001 and 2006 was also the City of Lethbridge, which experienced an increase of 10.8% or 7,263 residents over that period. More recently, the municipal census of 2010 showed 86,659 residents in Lethbridge; a 10.1% increase from the 2006 municipal census number. High growth was also seen in Coaldale: the municipal census of 2009 showed 6,943 individuals in Coaldale, a 13.7% increase from the 2005 municipal census[2].

Breakdown of Population by Municipality: South Central



Source: Statistics Canada Census 2006

Economic Indicators: South Central Region

Major Municipalities*	Status	2006 Population	2001 Population	5 Year % Change	1996 Population	10 Year % Change
Lethbridge	City	74,637	67,374	10.8%	64,938	14.9%
Lethbridge, County	Municipal District	10,302	9,935	3.7%	9,290	10.9%
Taber	Town	7,591	7,671	-1.0%	7,214	5.2%
Taber, M.D. of	Municipal District	6,280	6,012	4.5%	5,971	5.2%
Coaldale	Town	6,177	6,008	2.8%	5,731	7.8%
Blood 148	Indian Reserve	4,177	3,852	8.4%	4,326	-3.4%
Warner, County	Municipal District	3,776	3,798	-0.6%	3,561	6.0%
Vulcan County	Municipal District	3,718	3,778	-1.6%	3,829	-2.9%
Raymond	Town	3,205	3,200	0.2%	3,056	4.9%
Vulcan	Town	1,940	1,762	10.1%	1,537	26.2%

Source: Statistics Canada, Census 1996, 2001, 2006

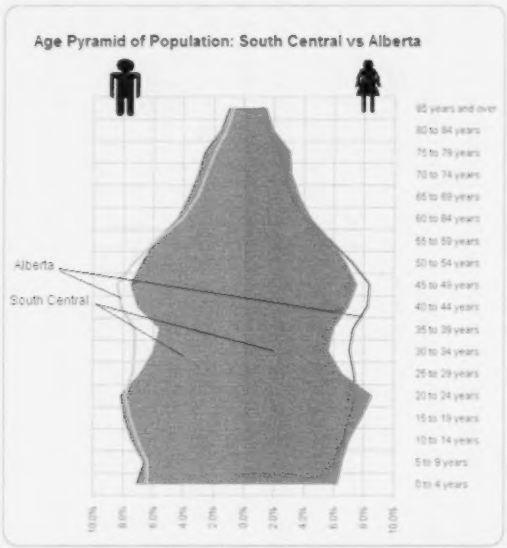
* Top 10 cities, towns, villages and municipal districts in region, based on population in latest census year

[1] Note: the Census under-estimates the overall population totals for any region or municipality as some people are not counted. The reasons for this under-coverage can range from some households not receiving a census questionnaire to individuals not being included in the questionnaire completed for a household.

[2] Numerical differences between the federal and municipal censuses may be ascribed to slight variations in the definition of "usual residence," as well as how "shadow populations" are treated. While municipalities define the "shadow population" as "temporary residents of a municipality who are employed by an industrial or commercial establishment in the municipality for a minimum of 30 days" and include them in their official population numbers if they consist at least 10% of the municipality's population or a minimum of 1,000 individuals, the shadow population of transient workers is not accounted for in population counts conducted by Statistics Canada.

Demographics

According to the most recent Statistics Canada Census, the population of the South Central Region was 131,008 in 2006 or 4.0% of Alberta's total population. This was a 6.8% increase from the Census estimate of 2001 and a 10.4% increase from the 1996 Census estimate. The Census indicates that, on average, the South Central region's population is somewhat younger than the provincial average. This may prove to be a challenge for the smaller cohort in the current prime working age group, as they are increasingly required to sustain the larger cohort of the retiring age group through higher productivity levels.



Economic Indicators: South Central Region			
	2006	**2001**	**1996**
Census Population[3]	131,008	122,717	118,677
% of Provincial Total	4.0%	4.1%	4.4%
Population Components	**2006**	**2001**	**1996**
Age Group: 0 - 14 (%)	20.3	22.0	23.7
Age Group: 14 – 24 (%)	16.0	16.4	N/A
Age Group: 25 – 44 (%)	27.5	25.5	N/A
Age Group: 45 – 64 (%)	21.7	24.7	N/A
Age Group: 65+ (%)	13.7	13.3	12.8
Dependency Ratio [4]	51.6	54.6	57.4
Old Age Dependency Ratio[5]	20.8	20.6	20.2
Source: Statistics Canada, Census 1996, 2001, 2006			

[3] See below paragraph about the under-coverage problems of Census population estimates

[4] Dependency Ratio: The percentage of the population below the age of 15(Child) and over the age of 64 (Elderly) divided by the number of adults (15-64). This is the population of children and elderly that are dependent on the adult population for economic needs.

[5] Age Dependency Ration: The percentage of the population over the age of 64 (Elderly) divided by the number of adults (15-64). This is the population that is dependent on the adult population for economic needs.

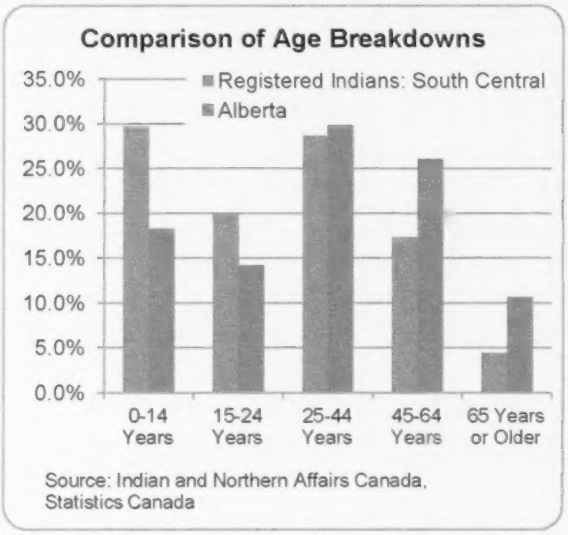
Although the Census provides the most detailed and accurate information at a single point in time on the demographic, social and economic conditions of the population, the Census under-estimates the overall population totals for any region as some people are not counted. The reasons for this under-coverage can range from some households not receiving a census questionnaire to individuals not being included in the questionnaire completed for a household. Therefore, the below presented post-censal estimates should be used as the official population estimates for the region.

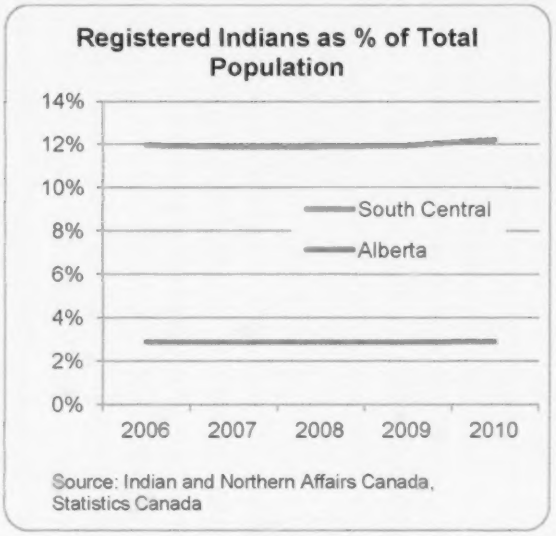
Population Estimates – South Central Region					
	2010	**2009**	**2008**	**2007**	**2006**
Total Population (Thousands)	145.0	143.9	141.9	139.2	135.5
Share of Provincial Total (%)	3.9%	3.9%	3.9%	4.0%	4.0%
Source: Statistics Canada – estimates as of July 1 of each year					

According to the post-censal estimates, the region's population increased by 9,500 or 7.0% between 2006 and 2010, compared with 8.8% growth at the provincial level. The region's share of Alberta's population was stable at 3.9% in 2010.

Aboriginals

In 2010, bands in the South Central Region had a population of 17,715 Registered Indians, 66.4% of whom lived on reserve and crown land. [1] This represents an 11.7% increase in registered population over five years. Registered Indians comprised 12.2% of the South Central Region's total population in 2010, compared with 2.9% for the province as a whole. Registered Indians in the South Central Region are significantly younger than the average Albertan; 30% are under the age of 15 (versus 18% of the provincial population).



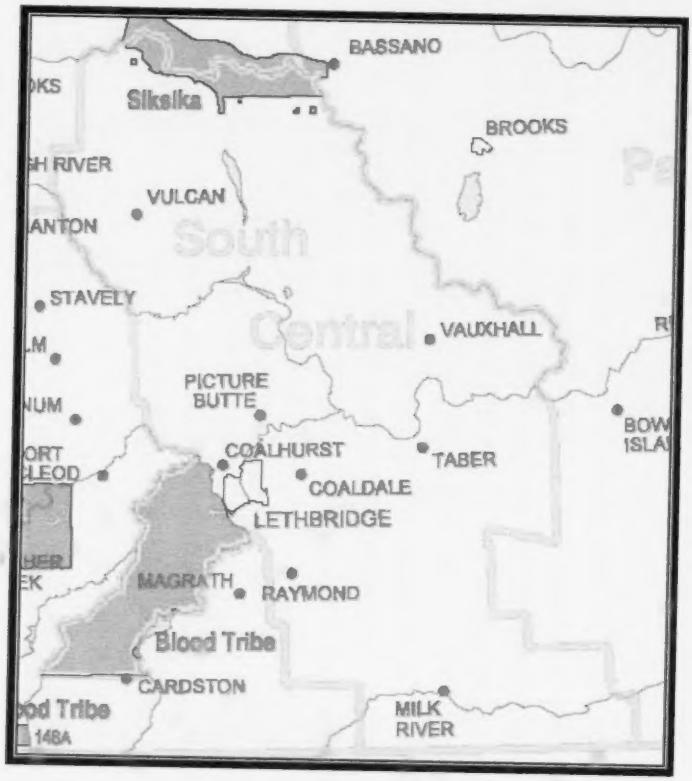


Registered Indian Population, by Type of Residence and Group: South Central Region

Group	Residence Type	2010	2009	2008	20007	2006	2005	1-Year Change	5-Year Change
Registered Indian	Total	**17,715**	**17,195**	**16,884**	**16,542**	**16,212**	**15,854**	**3.0%**	**11.7%**
	Reserve & Crown Land	11,760	11,508	11,389	11,197	11,068	10,933	2.2%	7.6%
	Off Reserve	5,955	5,687	5,495	5,345	5,144	4,921	4.7%	21.0%
Blood Tribe	Total	11,074	10,694	10,498	10,253	10,071	9,842	3.6%	12.5%
	Reserve & Crown Land	7,900	7,729	7,674	7,558	7,503	7,446	2.2%	6.1%
	Off Reserve	3,174	2,965	2,824	2,695	2,568	2,396	7.0%	32.5%
Siksika*	Total	6,641	6,501	6,386	6,289	6,141	6,012	2.2%	10.5%
	Reserve & Crown Land	3,860	3,779	3,715	3,639	3,565	3,487	2.1%	10.7%
	Off Reserve	2,781	2,722	2,671	2,650	2,576	2,525	2.2%	10.1%

Source: Indian And Northern Affairs Canada, Alberta Municipal Affairs, Treaty Lands and Calgary Region

[1] **Registered (Status) or Treaty Indians:** According to Statistics Canada Registered Indians (also referred to as "status Indians") refer to those persons registered under the *Indian Act* while Treaty Indian refer to people who are registered under the *Indian Act* and who belong to an Indian Band or First Nation that signed a treaty with the Crown. Registered/Treaty Indians may be classified as on or off reserve indicating their place of residence.


BASSANO
Siksika
BROOKS
VULCAN
South
Central
STAVELY
VAUXHALL
PICTURE
BUTTE
COALHURST
TABER
COALDALE
LETHBRIDGE
MAGRATH
RAYMOND
Blood Tribe
CARDSTON
MILK
RIVER
148A

Labour Force Characteristics

According to Statistics Canada's census data, the South Central Region's employment rate[7] for the working age population of 15 years and older was 66.2% in 2006 and the participation rate[8] was 69.0%. By comparison, Alberta's employment and participation rates were 70.8% and 73.4%, respectively in 2006

Between 2001 and 2006, the number of people employed in Alberta grew by 14.7% or by 239,800. Over the same period, employment in the South Central region grew by an estimated 7,300 or 12.1%. In 2006, the South Central Region made up 3.9% of Alberta's working age population (15+ years), and the region's increase in employment between 2001 and 2006 accounted for 3.0% of all new jobs created in Alberta over that period.

Note: Statistics Canada cautions the reader that the regional labour force data may be subject to large year-to-year fluctuations, especially for the smaller regions, Because of these data problems, Census data for 2001 and 2006 were used for all indicators for the smaller regions such as the South Central Region and data for these indicators for the other years are not included.

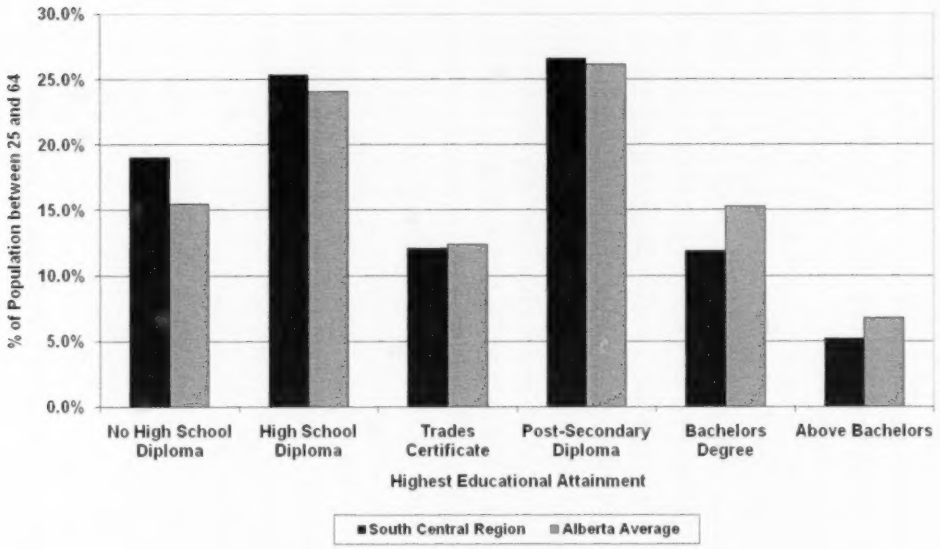
Economic Indicators: South Central Region		
Labour Force Characteristics	**2006**	**2001**
Population: 15+ (Thousands)	102.4	93.8
Labour Force: 15+ (Thousands)	70.7	63.7
Employment: 15+ (Thousands)	67.8	60.5
Unemployment: 15+ (Thousands)	2.9	3.2
Participation Rate: 15+ (%)	69.0	67.9
Unemployment Rate: 15+ (%)	4.2	5.0
Employment Rate: 15+ (%)	66.2	64.6
Source: Statistics Canada Census, 2001 and 2006.		

According to the 2006 census, the level of educational attainment is lower for this region than for Alberta. For the working aged population of between 25 and 64 years, 43.6% had a post-secondary degree or diploma, compared with 48.1% for all of Alberta. The region also has a slightly lower share holding a trades certificate: 12.0% in the region vs. 12.4% in Alberta. 19.0% of the region's working age population did not finish high school, higher than the Alberta average of 15.4%.

[7] The employment rate measures the proportion of the adult population that is employed. Employment Rate = (Employed / Population 15+)*100. High labour utilization traditionally accompanies strong economic activity.

[8] The participation rate measures the proportion of the adult population that is in the labour force. Participation Rate = (Labour Force / Population 15+)*100. High labour participation is an effective indicator of the level of engagement among the working age population and traditionally accompanies strong economic activity.

Highest Educational Attainment - South Central

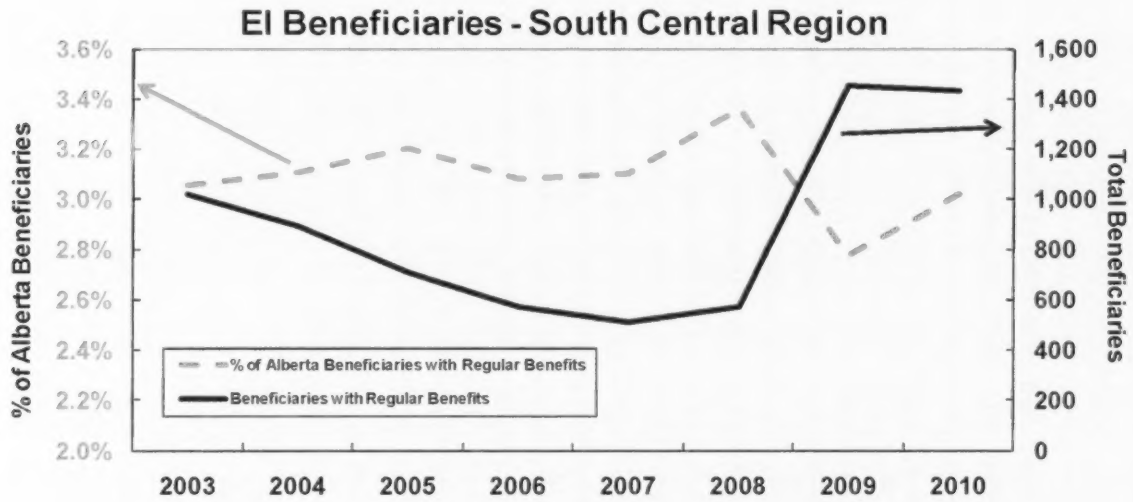


Employment Insurance Beneficiaries

In 2010, 1,430 people received regular Employment Insurance (EI) benefits[9] in the South Central region, a 1% decrease from the 2009 total of 1,450[10]. Over the same period, the number of EI recipients fell by 9% in Alberta. As a result, the region's share of Alberta EI recipients rose to 3.0%. Between February 2010 and February 2011, the number of regular beneficiaries fell by an estimated 18% in the region.

The total number of income beneficiaries[11] with both regular and special benefits, such as for sickness or parental leave, fell by 3% between 2009 and 2010.

Note: although this measure provides a useful gauge of unemployment it is an imperfect measure, as it excludes self-employed workers and individuals who were unemployed for more than 12 months. At the Canadian level, the EI beneficiaries-to-unemployed ratio was fairly stable over time prior to the recession at between 40% and 45%. In Alberta, the ratio fell gradually during the economic boom years from more than 40% in 1996 to less than 25% in 2007 and the first nine months of 2008. The ratio climbed to more than 40% in 2009 and was 36% in 2010.



EI Recipients: South Central								
	2005	2006	2007	2008	2009	2010	1-Year Change	5-Year Change
Total Income Beneficiaries	1,660	1,560	1,640	1,750	2,820	2,730	-3%	64%
# of EI Beneficiaries with Regular Benefits	710	570	510	570	1,450	1,430	-1%	101%
% of Alberta Beneficiaries with Reg. Benefits	3.2%	3.1%	3.1%	3.4%	2.8%	3.0%	0.2%	-0.2%
Source: Statistics Canada, Human Resource Development Canada								

[9] The number of beneficiaries receiving regular benefits excludes claimants receiving training, job creation and self-employment benefits as well as other employment and support measures benefits.

[10] Canada's Economic Action Plan provides beneficiaries with five extra weeks of regular EI benefits in 2009 and 2010.

[11] The number of beneficiaries receiving total income benefits includes both the beneficiaries receiving regular benefits and those receiving special benefits, such as for training, job creation, sickness, parental.

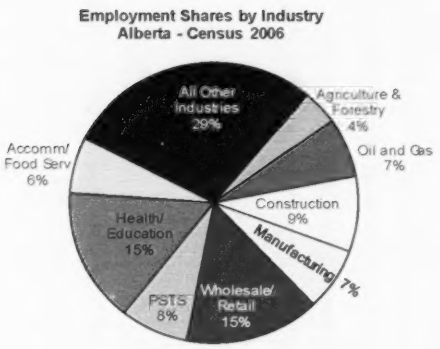
Employment by Industry

In 2006, according to Statistics Canada's census, the services-producing sector in the South Central Region accounted for about 70% of the total number employed. By comparison, the service sector accounted for 72% of Alberta's employment.

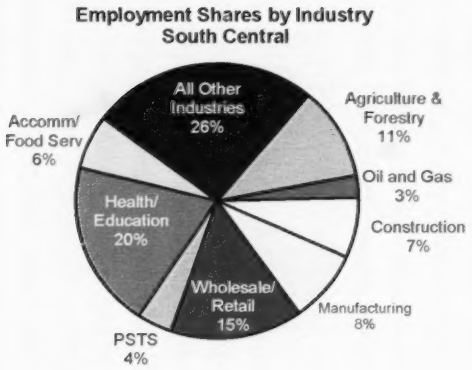
The Healthcare and Social Assistance industry had the largest number of individuals employed. This industry is dominated by nursing and residential care facilities and social assistance. The South Central Region accounted for 3.6% of total Alberta employment, but for 4.3% of Alberta employment in this industry. This industry is followed by the Retail Trade sector and Agriculture and Forestry sectors.

Between 2001 and 2006, Healthcare and Social Assistance industry had the largest employment gain (up 1,300). Large gains were also recorded in the Retail Trade sector (up 800), and in the Construction sector (up 600).

Economic Indicators: South Central River Region		
Employment by Industry	**2006**	**2001**
All Industries (Thousands) - Total	**67.8**	**60.5**
Goods-Producing Sector	**20.2**	**18.2**
Agriculture & Forestry	7.4	7.1
Mining & Oil & Gas	1.7	1.2
Utilities	0.5	0.3
Construction	4.8	4.2
Manufacturing	5.7	5.4
Services-Producing Sector	**47.6**	**42.3**
Wholesale Trade	2.5	2.4
Retail Trade	7.7	6.9
Transportation & Warehousing	3.2	3.3
Finance, Insurance, Real Estate & Leasing	2.5	2.3
Professional, Scientific & Technical Services	2.8	2.2
Business, Building & Other Support Services	2.4	1.8
Educational Services	5.4	5.1
Health Care & Social Assistance	7.8	6.5
Information, Culture & Recreation	2.0	1.8
Accommodation & Food Services	4.3	4.1
Other Services	3.5	3.1
Public Administration	3.3	2.7
Source: Statistics Canada Census, 2001 and 2006.		
Statistics Canada cautions the reader that the regional labour force data may be subject to large year-to-year fluctuations, especially for the smaller regions. Hence Statistics Canada Census 2001 and 2006 data was used for all labour force indicators in the South Central Region		



PSTS = professional, scientific and technical services



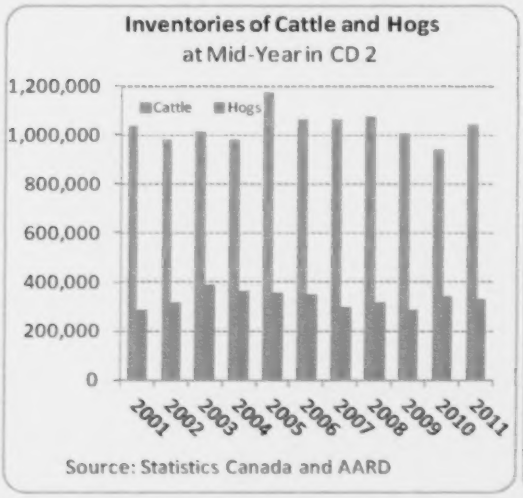
Agriculture

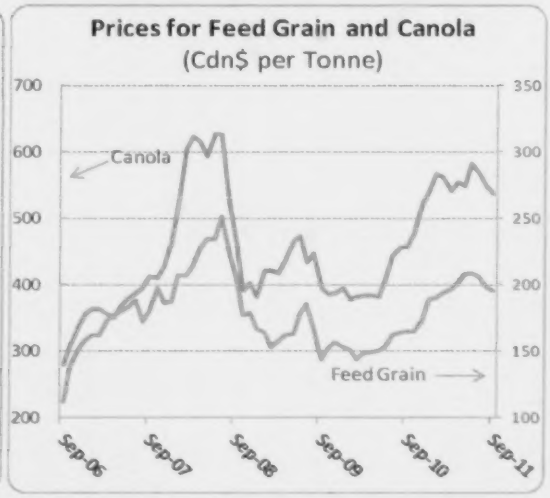
The South Central region had total farm cash receipts of $1.98 billion in Census year 2006, accounting for 20% of Alberta's farm receipts, the largest share of the 14 regions. In that year, there were just over 3,000 farms in the region with a total acreage of 4.2 million acres and average farm size was just over 1,400 acres.

The region accounted for 15.8% of the total value of on-farm livestock and poultry with a total market value of $791 million in 2006. The total number of cattle and calves was just over 950,000, most of them were beef cattle. Its share of Alberta's number of cattle and calves was 15.1%, of hogs 18.5%, and of hens and chickens 15.5%.

Cropland acreage totals about 2.4 million acres, 28% of which requires irrigation. It is the province's largest producer of durum wheat, accounting for 45% of Alberta's durum acreage, and is a major producer of barley and wheat. It is also one of the two largest provincial producers of specialty crops, such as potatoes, corn, sugar beets, chickpeas and beans.

Very few current agricultural indicators are available for these special geographies. However, livestock estimates are available for Census Division 2 (CD2), which encompasses most of the South Central region[1]. Between mid-year 2006 and the mid-year 2011, the number of cattle and calves in CD2 fell by less than 2% and the number of hogs by 4%.





In crop year 2009-10 (year ending August 31, 2010), grain and oilseed deliveries at elevators in the South Central region totaled 1.6 million tonnes[2], down 15% from 2008-09. Wheat accounted for 55% of the 1.6 million tonnes, followed by durum wheat (28%) and peas (8%).

Prices for canola and feed grain had more than doubled between early 2006 and the summer of 2008, but fell sharply by about 40% through early 2009. Crop prices rebounded strongly between spring 2010 and summer 2011, but recent global uncertainties have led to modest price declines during the past few months. Prices for red spring wheat fell sharply in August and September, but recovered some of their losses in October 2011. The recent weakening of the Canadian dollar against the US dollar will benefit Alberta crop and cattle growers.

In 2011, Alberta crop production was significantly higher than in the previous year, with record harvests of canola (4.8 million tonnes) and spring wheat (7.6 million tonnes). Crop conditions in the South Central region were also better than normal that year.

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[1] A map of Agricultural Census Divisions can be found in: http://www.statcan.gc.ca/ca-ra2006/m/car-rar-eng.pdf

[2] Deliveries at grain elevators are not representative of production as not all grain is shipped to local elevators

Energy

Oil and gas production in the South Central region has fallen over the last five years, with gas production declining by 40.2% between 2004 and 2009, and oil production by 30.0% over the same period. Between 2008 and 2009, gas production declined by 14.9% while oil production fell by 9.4%.

South Central's share of overall Alberta gas production was 1.5% in 2009, making it the 10th largest producer out of 14 regions. Average annual gas prices dropped by 53.3% in 2009 to $3.65 per gigajoule. So far in 2010, gas prices have averaged $3.73, a slight increase from 2009, and low by historical standards.

The South Central region is the 8th largest conventional oil producing region in Alberta and the 9th largest overall oil producer (combining conventional and oil-sands). The region's share of Alberta's conventional oil production was 6.6% in 2009, but its share of total crude oil output was only 1.6%. Oil prices dropped by 38.0% to US$61.80 per barrel in 2009. However, so far in 2010 oil prices have averaged $78.96, an increase of 27.8%.

Over the last five years, the number of spudded wells[14] in the region has dropped 89.1%. Between 2008 and 2009, the spud count dropped by 72.9% to 93 wells, accounting for 1.3% of the Alberta total. Part of the decline can be attributed to a weak global economy and soft energy prices. However, in the first 10 months of 2010, the number of wells drilled in Alberta rose 44% from the same period of 2009, largely because of a more than doubling in the number of conventional oil wells. The Petroleum Services Association of Canada is forecasting an increase of 5% in 2011 over 2010 for Alberta drilling. These drilling estimates and forecasts should provide some optimism for oil producers in South Central.

Economic Indicators: South Central Region

Oil and Gas Statistics

	2009	2008	2004	% Change 1 Year	% Change 5 Years
Crude oil production (millions of cubic metres)	1.8	1.9	2.5	-9.35%	-29.95%
Natural gas production (billions of cubic metres)	2.1	2.5	3.6	-14.94%	-40.18%
Number of wells spudded	93	343	856	-72.89%	-89.14%

Source: Alberta Energy

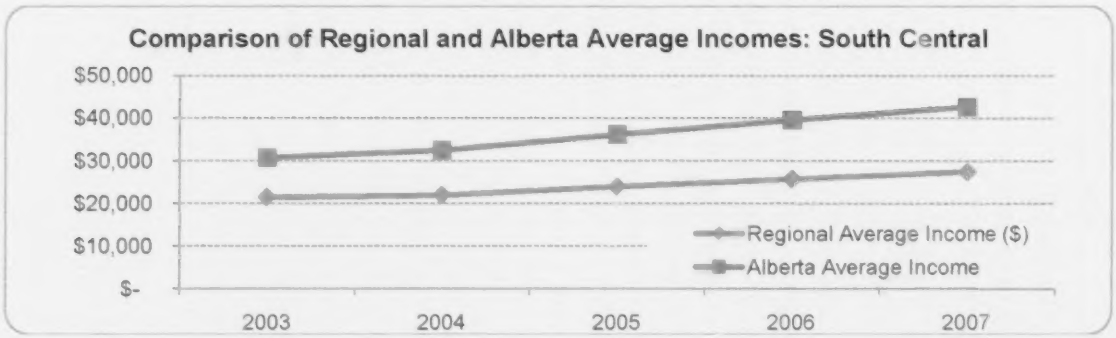
The region's total gas potential represents 3.0% of Alberta's overall reserves, and oil potential is 4.7% of Alberta's conventional reserves.

[14] A spud is the very beginning of a drilling operation for a well

Income, Taxfiler

In 2007, the average individual income in the South Central Region was $27,405, a 6.6% increase from 2006, but 35.6% less than the provincial average of $42,570 in 2007. In the same year, average couple income[19] in the South Central Region was $87,005, a 9.8% increase from the year before, but 30.7% less than the provincial average of $125,485 in 2007.

The percentage of taxfilers that reported an individual gross income over $100,000 was 3%, while 26.9% of taxfilers identified as couples reported an income of over $100,000.



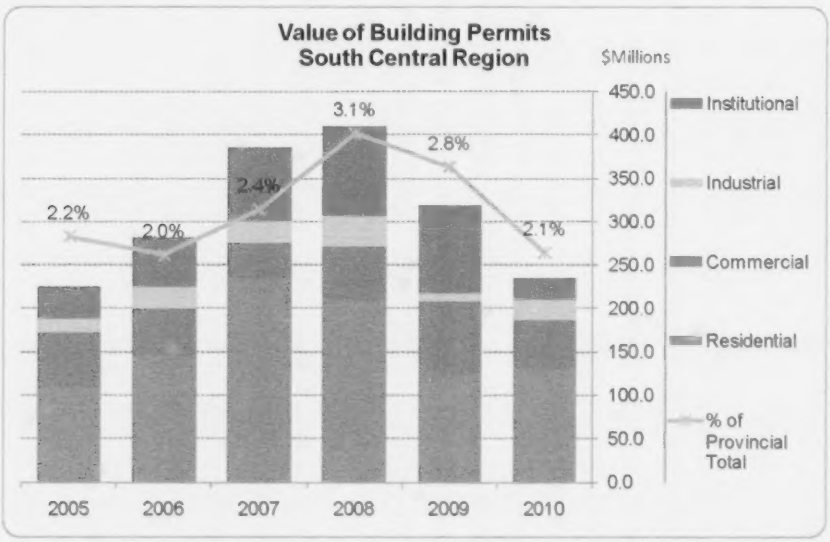
Economic Indicators: South Central Region						
	Single Taxfilers			Couple Taxfilers		
	2007	2006	2003	2007	2006	2003
Average Income ($)						
South Central	$27,405	$25,715	$21,470	$87,005	$79,255	$65,210
% Change 1 Year	6.6%			9.8%		
% Change 4 Year	27.6%			33.4%		
Alberta	$42,570	$39,560	$30,770	$125,485	$115,965	$87,775
% Change 1 Year	7.6%			8.2%		
% Change 4 Year	38.3%			43.0%		
Income Range						
0 or Negative	23.2%	23.5%	23.3%	0.4%	0.3%	0.5%
$1-$20,000	30.9%	32.8%	36.1%	6.7%	7.9%	9.9%
$20,000-$40,000	20.5%	20.3%	21.7%	16.7%	18.8%	23.5%
$40,000-$60,000	12.8%	12.1%	10.7%	17.4%	19.1%	21.7%
$60,000-$80,000	6.6%	6.2%	5.0%	17.6%	17.9%	18.5%
$80,000-$100,000	3.0%	2.6%	1.7%	14.4%	13.3%	10.9%
Over $100,000	3.0%	2.5%	1.5%	26.9%	22.6%	15.1%
Source: Alberta Finance and Enterprise						

[19] Couples are defined as married or common-law

Investment

In 2010, the total building permit value for the South Central region stood at $234.3 million, making up 2.1% of the provincial total. In 2010, the total building permit value for the South Central region decreased by 26% from 2009, but was 4.2% higher than the 2005 level. The decrease between 2009 and 2010 can be attributed to a very large drop in institutional permits of 76% to $23.9 million and a 32% decrease in commercial permits to $58 million. Over the same period, industrial permits jumped by 187%, while residential permits increased by 5% to $129.5 million. Between 2005 and 2010, residential permits increased by 19%.

The total number of dwelling units for which building permits were taken out in the South Central region in 2010 was 950. This was an 11% increase from the previous year but was a 1% decline from 2005 levels. Over that five-year period, the number of multiple family dwelling units fell by 7% to 273 units in 2010. Over the same period, the number of single dwellings increased by 2% to 677 units.



In 2010, the number of urban housing starts[20] totaled 770 in the Lethbridge Census Agglomeration (CA), a decrease of 15% from 2009's 907 starts. This decrease was the result of declines of 10% and 27%, respectively, in the numbers of single-family and multi-family units between 2009 and 2010.

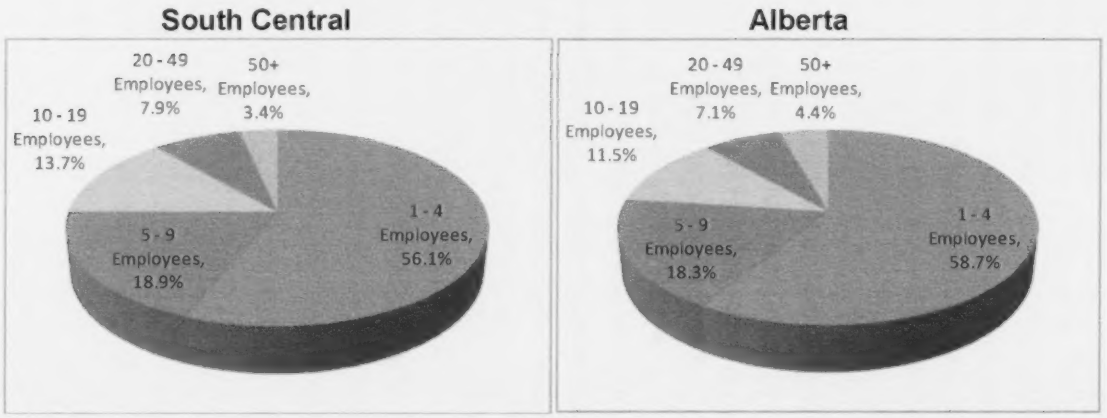
[20] Housing start information is gathered by Canada Mortgage and Housing Commission field offices; building permit estimates are gathered by Statistics Canada from municipalities. A building permit generally precedes the actual start.

Economic Indicators: South Central Region								
Building Permits: Value ($ Millions)								
	2010	**2009**	**2008**	**2007**	**2006**	**2005**	**% Change 1 Year**	**% Change 5 Years**
Total	234.3	318.3	410.3	384.4	282.0	224.8	-26.4%	4.2%
% of Provincial Total	2.1%	2.8%	3.1%	2.4%	2.0%	2.2%	-27.3%	-6.7%
Commercial	58.0	85.8	61.2	40.9	54.2	63.9	-32.3%	-9.2%
Industrial	22.9	8.0	35.1	23.9	25.2	16.5	187.1%	38.6%
Institutional	23.9	100.9	103.1	84.9	57.2	35.9	-76.4%	-33.5%
Residential	129.5	123.7	210.9	235.5	145.5	108.5	4.7%	19.3%
Building Permits: Number of Dwelling Units								
	2010	**2009**	**2008**	**2007**	**2006**	**2005**		
Total	950	853	1263	1,596	1,115	957	11.4%	-0.7%
% of Provincial Total	3.6%	3.8%	4.5%	3.4%	2.2%	2.2%	-5.7%	63.2%
Single Dwellings	677	660	913	1,258	951	663	2.6%	2.1%
Multiple Use Dwellings	273	193	350	338	164	294	41.5%	-7.1%
Source: Statistics Canada, Compilation by Alberta Finance and Enterprise								

Establishments with Employees

In 2010, the South Central Region had 5,518 establishments with employees, making up 3.8% of all establishments with employees in Alberta. Of these establishments, 5,329 or 96.6% were small companies with between 1 and 49 employees. Micro-businesses with fewer than five employees have a 56.1% share of the region's total number of companies and large companies with 50 or more employees have a 3.4% share, compared to the 4.4% Alberta average.

Number of Establishments by Employee Size in 2010:
South Central Region and Alberta


South Central
20 - 49 Employees, 7.9%
50+ Employees, 3.4%
10 - 19 Employees, 13.7%
1 - 4 Employees, 56.1%
5 - 9 Employees, 18.9%
Alberta
20 - 49 Employees, 7.1%
50+ Employees, 4.4%
10 - 19 Employees, 11.5%
1 - 4 Employees, 58.7%
5 - 9 Employees, 18.3%

Between 2005 and 2010, there was an increase of 4.1% (or 216 companies) in the total number of businesses in the South Central Region and a 4.4% rise (or 223 companies) in the number of small businesses. By comparison, at the provincial level, the total number of businesses increased by 2.3% and small companies experienced an increase of 3.4% over the same period.

In the South Central Region, 68% of companies with employees were involved in service industries in 2010. The total number of companies in service industries rose by 2.0% over the past five years, while the goods industry had an 8.8% increase over the same period.
Utilities and Construction is the largest industry in the region, making up 13.2% of establishments with employees in the South Central Region (the Construction sector accounts for 98% of all companies in this sector). By comparison, 13.8% of establishments with employees are engaged in the Utilities and Construction industry at the provincial level. Other large industries are Agriculture and Forestry, and Retail Trade.

Over the past five years, the Utilities and Construction industry also experienced the highest growth in the number of businesses, up 30.3% between 2005 and 2010. The Mining, Oil and Gas Extraction, Health Care and Social Assistance, and Education industries also had large increases of more than 10% in the number of establishments over the same period. Transportation and Warehousing registered the largest decline: down 8.4% between 2005 and 2010. Agriculture and Forestry registered a 7.5% drop

over the same period. Almost all companies in the Agriculture and Forestry industry are agricultural businesses.

Numbers of Establishments by Industry South Central Region								
	All Companies (1+ Employees)				Small Companies (1-49 Employees)			
	2005	2009	2010	5-Year % Change	2005	2009	2010	5-Year % Change
Total, All Industries	**5,302**	**5,602**	**5,518**	**4.1%**	**5,106**	**5,409**	**5,329**	**4.4%**
Total, Goods Industries	**1,617**	**1,775**	**1,760**	**8.8%**	**1,564**	**1,733**	**1,711**	**9.4%**
Agriculture & Forestry	763	719	706	-7.5%	758	718	703	-7.3%
Mining, Oil & Gas Extraction	104	133	124	19.2%	103	132	123	19.4%
Utilities & Construction	561	723	731	30.3%	547	712	720	31.6%
Manufacturing	189	200	199	5.3%	156	171	165	5.8%
Total, Service Industries	**3,685**	**3,827**	**3,758**	**2.0%**	**3,542**	**3,676**	**3,618**	**2.1%**
Wholesale Trade	302	286	293	-3.0%	296	284	290	-2.0%
Retail Trade	627	640	647	3.2%	596	608	617	3.5%
Transportation & Warehousing	334	340	306	-8.4%	325	333	299	-8.0%
Information, Culture, Recreation & Arts	124	126	124	0.0%	116	114	113	-2.6%
Finance, Insurance, Real Estate & Leasing	395	392	395	0.0%	385	391	394	2.3%
Professional, Scientific & Technical Services	419	462	454	8.4%	416	457	450	8.2%
Administrative & Waste Management Services & Management of Companies	260	294	279	7.3%	257	286	272	5.8%
Educational Services	51	51	57	11.8%	45	44	50	11.1%
Health Care & Social Assistance	402	444	445	10.7%	371	415	417	12.4%
Accommodation & Food Services	272	279	271	-0.4%	247	249	247	0.0%
Other Services Excluding Private Household Services*	466	481	455	-2.4%	465	473	447	-3.9%
Public Administration	33	32	32	3.1%	23	22	22	-4.3%
Source: Canadian Business Patterns, Statistics Canada								

* A new subsector, Private Households (hiring cooks, nannies, etc.) was created in 2006, thereby inflating the 2006 to 2010 estimates for the sector and the region as compared to previous years. Hence, to make the data comparable, the values shown for the "Other Services Excluding Private Household" industry has been adjusted and does not include the Private Households sector data.

Inventory of Major Projects

As of March 31, 2011 there were 32 projects proposed, planned, under construction or recently completed in the South Central region. Of these projects, 18 are in either the Infrastructure or the Institutional category.

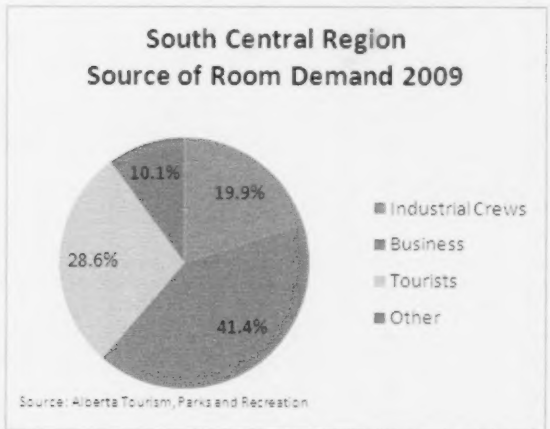
The total value for the projects in the South Central region was $1.9 billion, as of March 31, 2011. Approximately one half of the projects' value is attributable to Power projects, and Biofuel facilities accounted for an additional 20%.

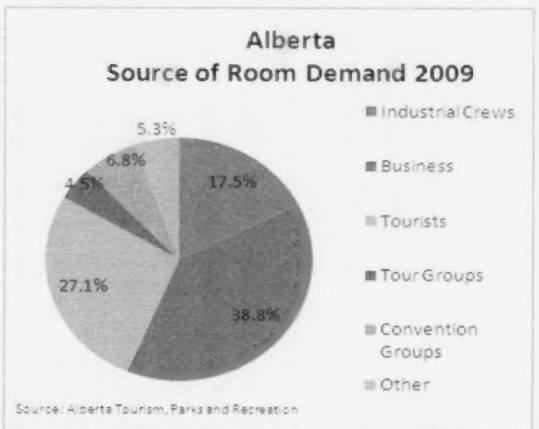
Economic Indicators: South Central Region				
Major Construction Projects, as of March 31				
	Number of Projects		**Value ($millions)**	
Industry Sector	**2011**	**2010**	**2011**	**2010**
Agriculture & Related	1	0	$23.0	$0.0
Biofuels	3	3	$385.0	$388.0
Commercial/Retail	1	1	$5.2	$5.2
Infrastructure	8	19	$115.5	$227.8
Institutional	10	20	$225.0	$599.5
Other Industrial	1	0	$8.0	$0.0
Pipelines	0	5	$0.0	$103.8
Power	4	6	$1,056.0	$1,284.0
Tourism/Recreation	4	3	$80.3	$65.3
Total	**32**	**57**	**$1,898.0**	**$2,673.6**
% of Provincial Total	**3.8%**	**6.2%**	**1.0%**	**1.2%**
Source: Alberta Finance and Enterprise, Inventory of Major Alberta Projects				

Note: 2010 and 2011 cannot be compared because some projects are carried over several years and there is only one cost available for the entire project.

Accommodation & Hospitality

In 2009 South Central Region had 25 accommodation properties with a total of 1,645 rooms, representing 2.6% of available rooms in Alberta. Business travelers made up 41.4% of room demand, followed by tourists at 28.6%. The average occupancy rate in the region was 59.6%, compared to the provincial average of 58.6%. The average room rate was $86.62, which is 22.8% less than the provincial average of $112.19.





Economic Indicators: South Central Region		
Accommodation Statistics	**2008**	**2009**
South Central		
Number of Properties	25	25
Supply of Rooms	1,674	1,645
Share of Alberta Rooms	2.7%	2.6%
Average Number of Rooms/Property	67.0	65.8
Occupancy Rate	61.0%	59.6%
Average Room Rate	$82.99	$86.62
Alberta		
Average Number of Rooms/Property	82.5	82.0
Occupancy Rate	68.2%	58.6%
Average Room Rate	$113.54	$112.19
Source: Alberta Tourism, Parks and Recreation		

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- Alberta Oil Sands Industry Quarterly Update
- Facts on Alberta
- Highlights of the Alberta Economy
- Inventory of Major Alberta Projects
- Monthly Economic Review
- Alberta Natural Gas Industry Quarterly Update